

Pattern-based Strategy

**Strategically Aligning Information Management
for Mission Success**

3/17/2011

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Report Documentation Page

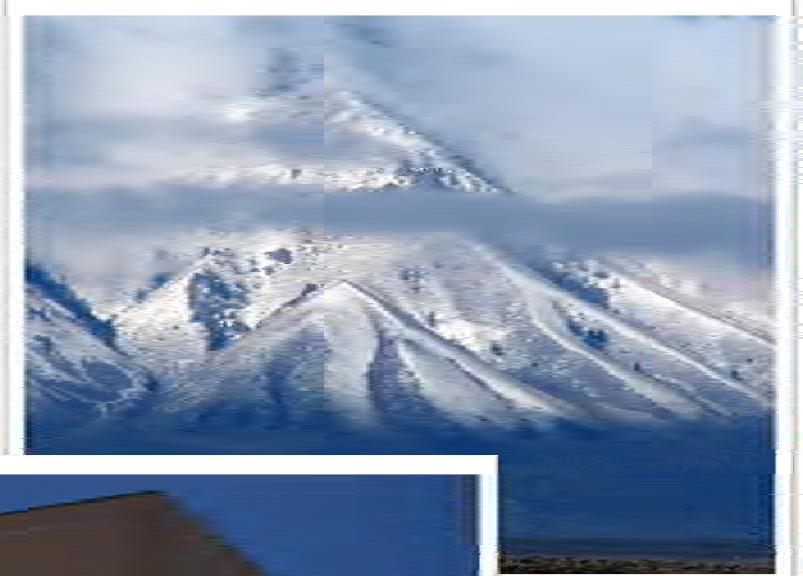
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About Me

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- Information Management
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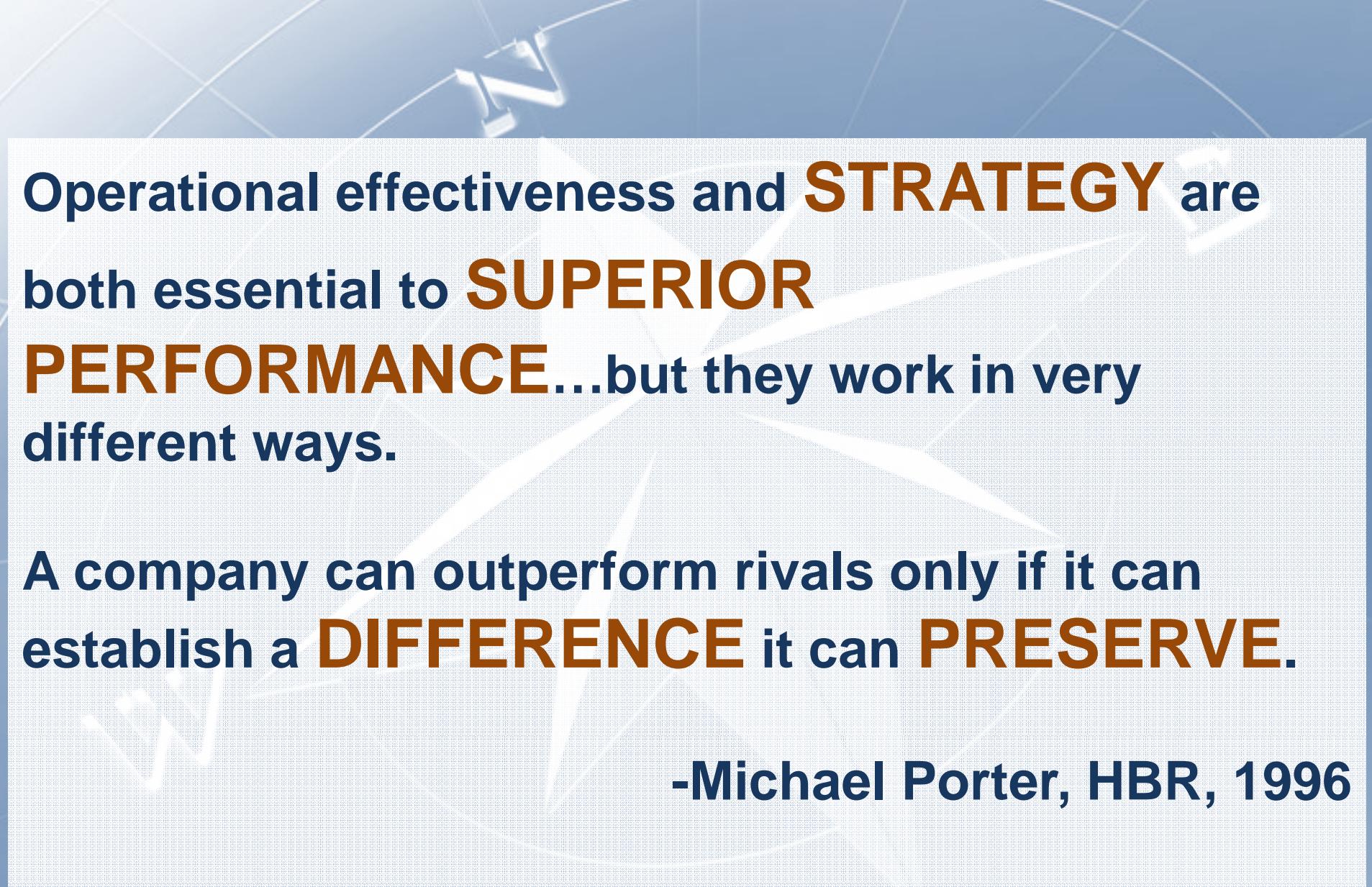
Mission

- Ensure the nation's energy security with safe, competitive, and sustainable energy systems and unique national and homeland security capabilities.

Vision

- By 2015, INL will be the pre-eminent nuclear energy laboratory with synergistic, world-class, multi-program capabilities and partnerships.





Operational effectiveness and **STRATEGY** are both essential to **SUPERIOR PERFORMANCE**...but they work in very different ways.

A company can outperform rivals only if it can establish a **DIFFERENCE** it can **PRESERVE**.

-Michael Porter, HBR, 1996

Examples



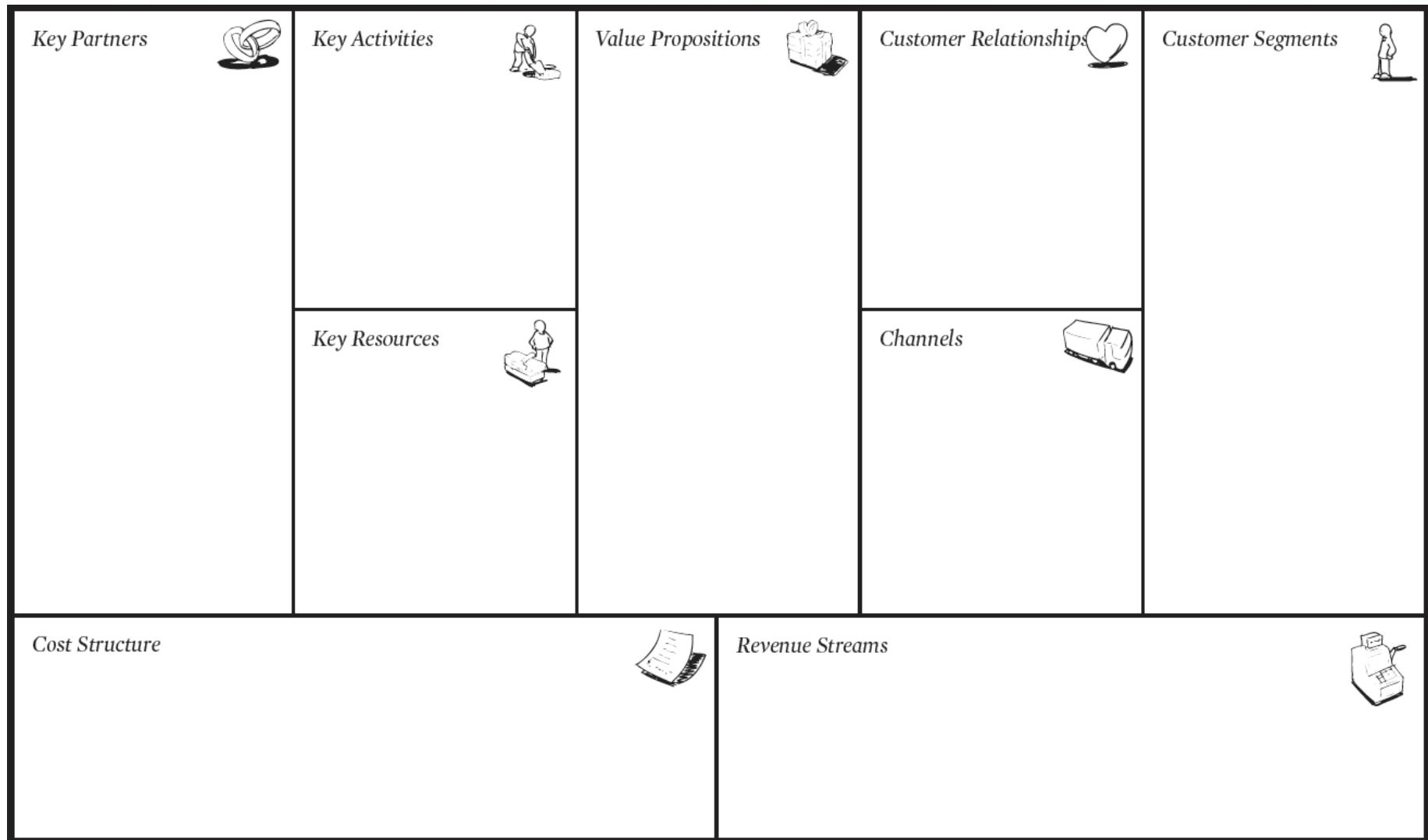
Patterns + Context = Strategy



Patterns

Groups and structures in the data that are, in some way or another, **similar**.

Business Context



What is Strategic?

- Things are strategic because they support the company's sources of **competitive advantage**.
 - Things that are valued and attractive to customers
 - Things that are unique in the marketplace
 - Things that are not easily copied
 - Things that are not easily substituted by other things

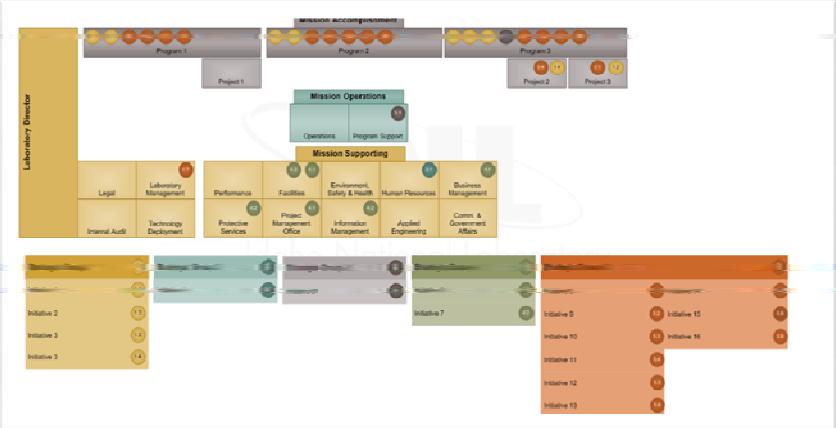
- Mark P. McDonald, Gartner

$$\begin{aligned}\log (AB) &= \log A + \log B \\ \log (A/B) &= \log A - \log B \\ \log (A^n) &= n \log A \\ \log_b a &= \frac{\log_a a}{\log_a b}\end{aligned}$$



“Know thy Customer”

- What is the strategy of the organization?
- Who is executing the strategy and what are their needs?



- Company Strategy
- News Stories (iNotes)
- Projects
- Department Strategies
- Organizational Structure
- Business Architecture

Customer Engagement

- Interviews
- Focus Groups
- Service Issues
- Past Complaints



Capture / Record



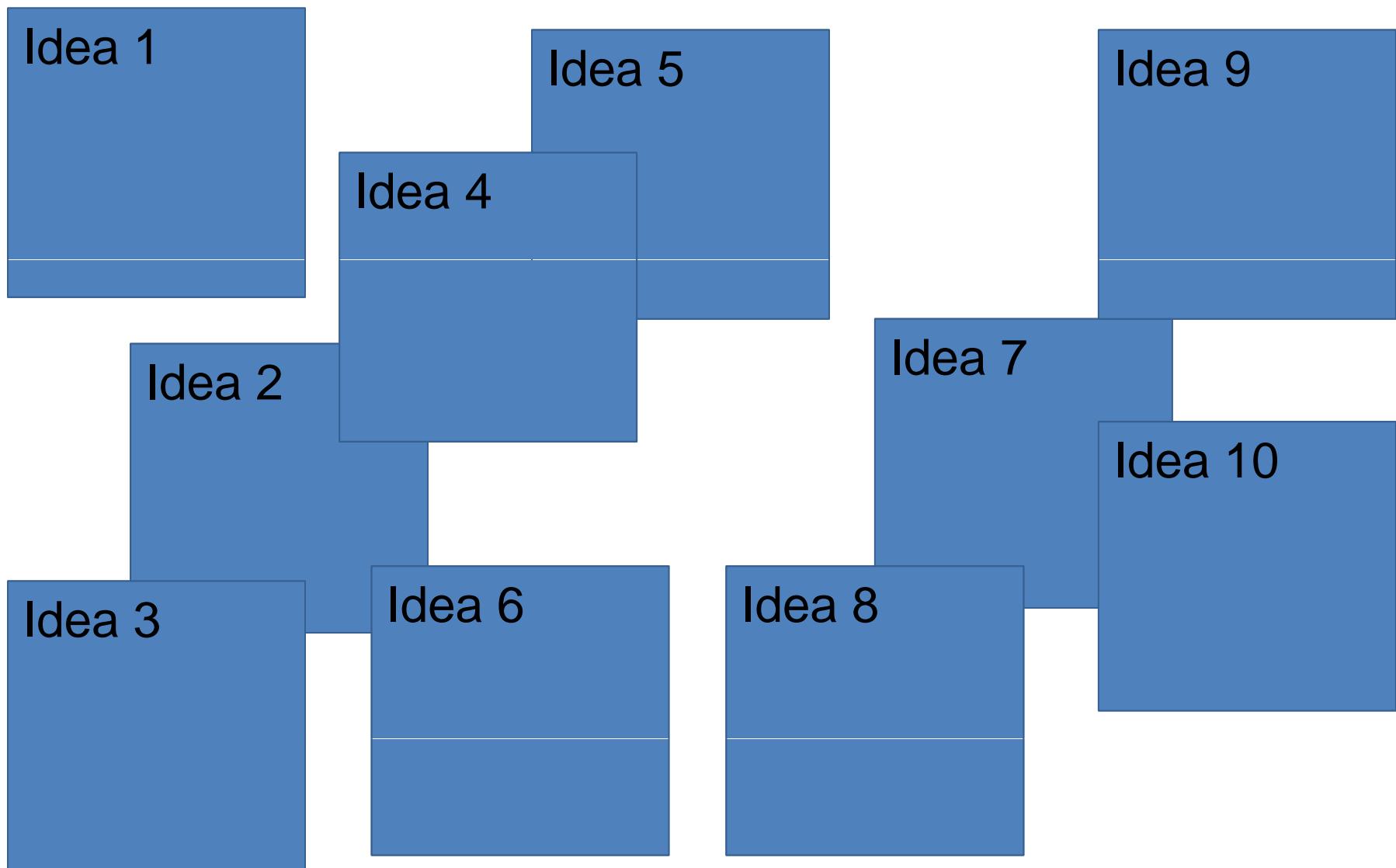
- Challenges – What keeps them up at night?
- Successes – What is occurring in their organizations that is noteworthy?
- *Names*
- *Dates*
- *Actual Statements from Participants*
- *Customer Terminology*

Pattern Identification

Affinity Diagram / Sticky Note Method

- Sort Ideas into natural themes by asking:
 - What ideas are similar?
 - Is this idea connected to any of the others?
- Organization
 - Headers
 - Color

Sticky Note Method



Sticky Note Method



Category 1

Idea 1

Idea 2

Idea 9

Category 2

Idea 5

Idea 10

Idea 4

Idea 7

Category 3

Idea 6

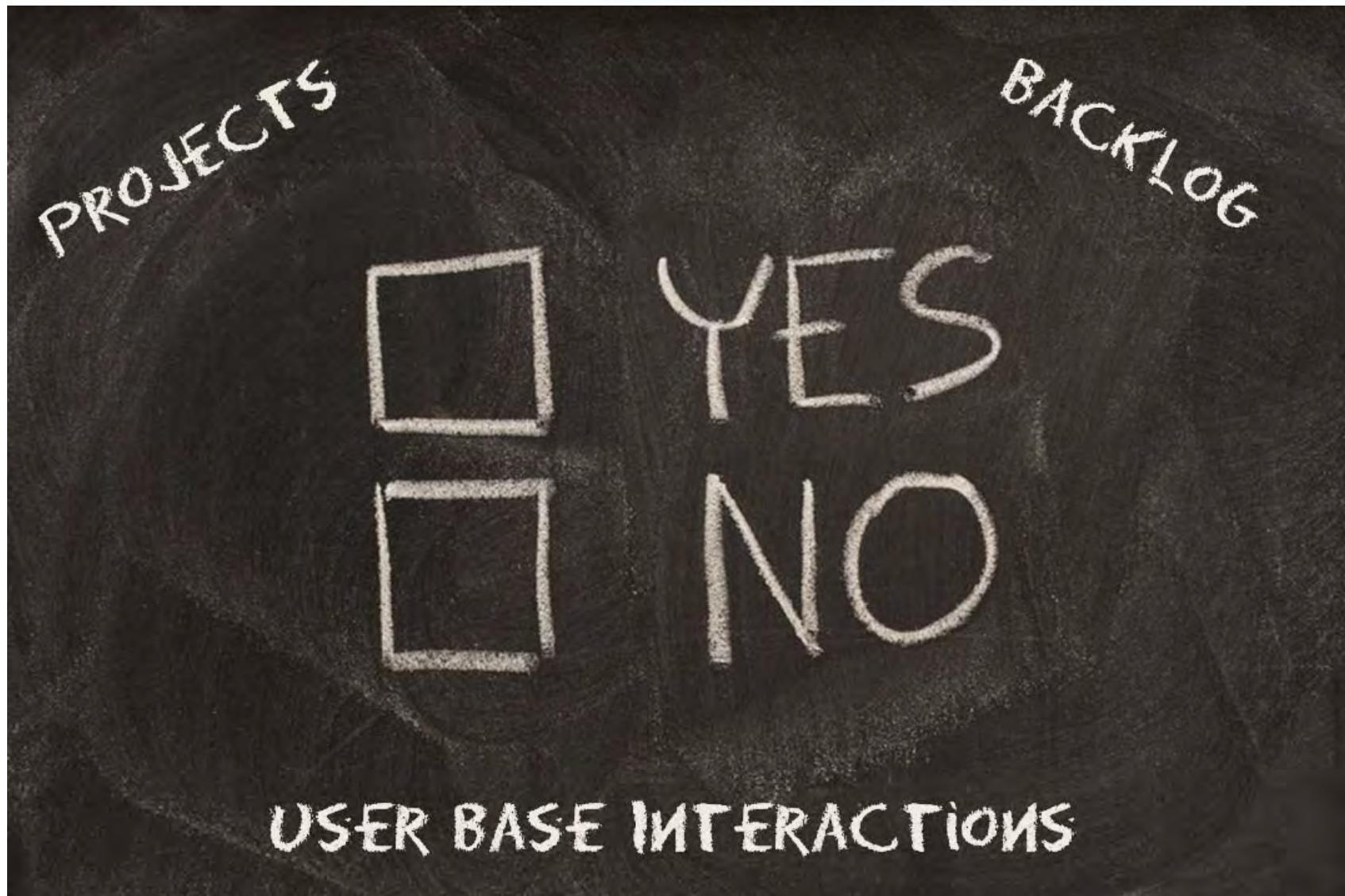
Idea 3

Idea 8



- High Level Strategic Areas
- End State Goals
- Prioritization

Strategic Validation



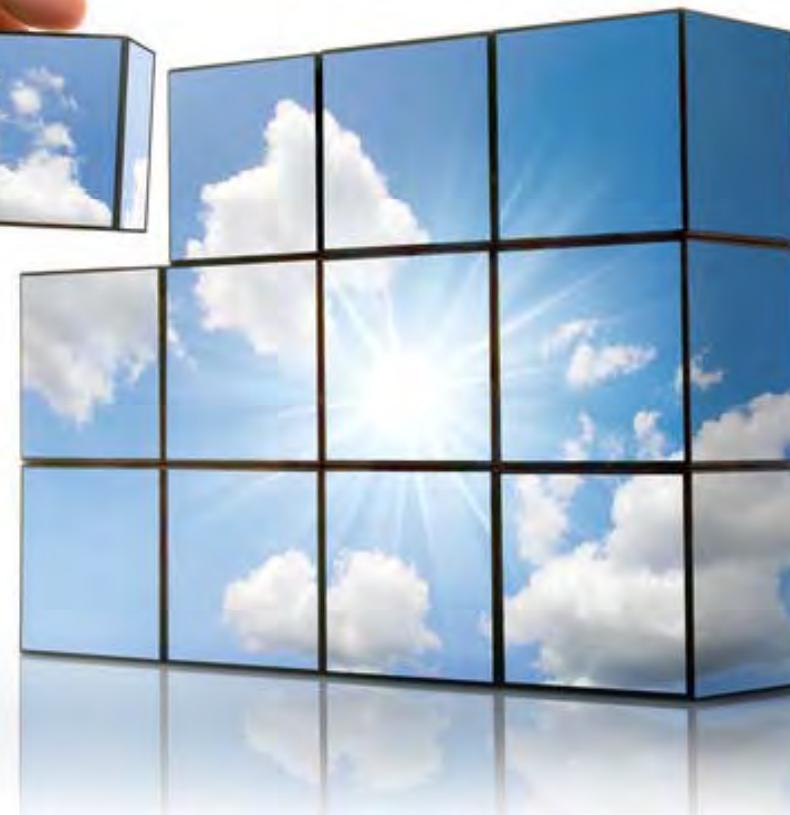
Distributed Ownership

- Strategic Initiative Review Meeting
 - Distributed Ownership
 - Presentation
 - Internalization

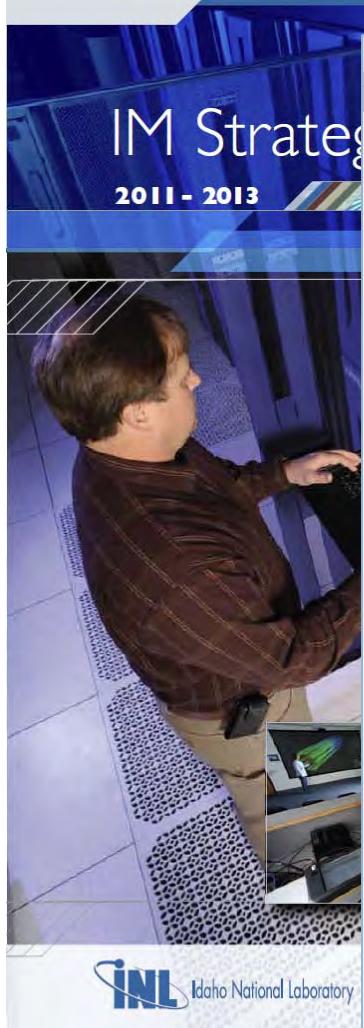


Planning **Strategic Execution**

- Deliverables
 - Timeline
 - Success Factors
 - Metrics



Strategic Plan



Goal 1: Sustaining the Laboratory

Sustain the operations of the Laboratory by:

- Creating processes and constructs that will deliver a consistent, planned, executed, and managed effectively to provide reliable infrastructure.
- Delivering high quality, reliable infrastructure that matches the needs of the Laboratory.
- Providing means for ensuring that organizational human resources are developed and utilized effectively.
- Developing background integration between systems to support Laboratory mission needs.

Goal 2: Enabling the Laboratory

Enable growth in the Laboratory by:

- Delivering the right information, to the right people, in the right format, at the right time.
- Enabling secure and ever-present connectivity between the Laboratory and its partners.
- Supporting the Laboratory in establishing a reputation of quality and reliability.
- Ensuring a robust and capable environment for Laboratory mission needs.

Goal 3: Transforming the Laboratory

Transforming the Laboratory to a highly agile organization by:

- Combining technologies, processes and management to create value to Laboratory mission success.
- Ensure business processes that are intuitive and easy-to-work.
- Provide innovative solutions to mission organization challenges.
- Realign organizational resources supporting information management and Laboratory activities.

Goal 4: Protecting the Laboratory

Ensure protection of Laboratory assets by:

- Establishing an outcomes-based risk-management approach that ensures the Laboratory is best suited for the evolving security landscape.
- Enhancing the Laboratory usage of classified infrastructure and classified programs.
- Identifying and organizing data across the Laboratory, both classified and unclassified, for Laboratory decision making.
- Creating an established lifecycle for systems that ensure mission through retirement of legacy systems and reapplying resources to mission needs.

Transforming the Laboratory

High Performance Workplace

High Performance Workplace is the development framework that engages with organizations to support Laboratory in transformational activities to enhance Laboratory performance.

A High Performance Workplace is an environment that combines technologies, processes and management to foster high individual, workgroup, and corporate performance. It includes multiple factors that enhance the ability to deliver business value. It focuses on highly skilled workers so that they can be more efficient and innovative. It supports employees in enhancing the areas of:

- Learning
- Discovering
- Innovating
- Leading

The High Performance Workplace initiative will:

The High Performance Workplace initiative will:

- Empower employees to deliver business value through the effective use of process, information and technology.
- Provide an environment that fosters creativity and innovation.
- Facilitate organizational change to ensure future mission success.

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Roadmap

IM Strategic Initiative

Evolve

- ① High Performance Workplace (HPW)
- ② Business Enablement Framework
- ③ Information Management Consolidation

Sustain

- ④ Operational Excellence
- ⑤ Solidifying Electronic Infrastructure
- ⑥ Human Capital Management
- ⑦ System Integration

Enable

- ⑧ Information & Knowledge Management
- ⑨ Collaboration & Communication
- ⑩ Reputation & Professionalism
- ⑪ Modeling & Simulation Infrastructure

Protect

- ⑫ Evolving Cyber Security
- ⑬ Enhancing Classified Infrastructure
- ⑭ Information Acquisition & Stewardship
- ⑮ Divestment of Legacy Systems

2011 Deliverables

- ① HPW Services (e-mail, calendaring, instant messaging)
- ② Management systems - mission integration
- ③ Future service roadmaps (HR, PMO, Finance)
- ④ Lab-wide IM assessment
- ⑤ Integration of Information Services

- ⑥ Cross-functional Advisory Group for software investments
- ⑦ Enhanced mobile capabilities
- ⑧ Voicemail integration with messaging environment
- ⑨ Identification of strategic business systems (asset portfolio)

- ⑩ INL Business Intelligence foundation and information value assessment
- ⑪ Enhanced video conferencing
- ⑫ HPW FY-12 requirements
- ⑬ Innovation Community of Practice to identify strategic investments
- ⑭ New high-speed super-cluster
- ⑮ Idaho Computing Consortium

- ⑯ Secure mobile device expansion
- ⑰ Classified workstation expansion
- ⑱ INL data dictionary
- ⑲ IM asset evaluation (identifying \$5 million for commoditization & divestment)

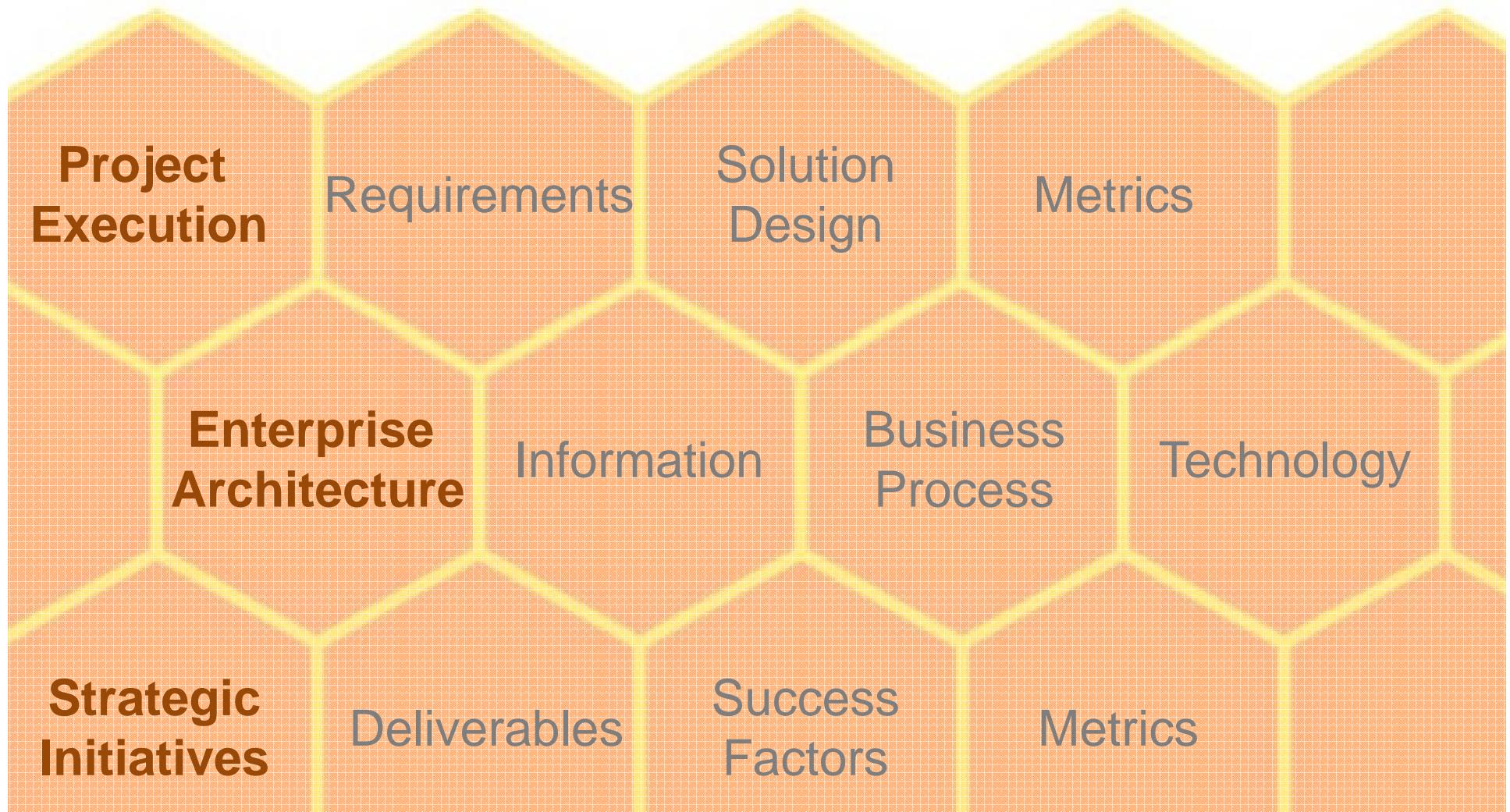
2012 Deliverables

- ① HPW Services (Internal / external collaboration)
- ② 100% of Lotus Notes divested
- ③ Future service roadmaps (Supply Chain, F&S, ES&H)
- ④ Lab-wide IM consolidation plan

- ⑤ IM service optimization (commodity divestment)
- ⑥ Enhanced telecommuter support services
- ⑦ Integration of strategic business systems (PMO, Finance, HR)

- ⑧ Multi-source information aggregation
- ⑨ INL Information benchmark (Hackett)
- ⑩ INL mobile device applications (e.g. TA, expense report, timesheet)
- ⑪ Desktop video conferencing
- ⑫ HPW FY-13 requirements
- ⑬ HPC data center expansion

- ⑭ Identity and access management (smart card)
- ⑮ Virtualized classified architecture
- ⑯ INL knowledge capture
- ⑰ INL business information transparency



Next: Business

- Strategic Plan = Tool
 - Communicate
 - Re-Engagement
 - Re-Calibration

